eSubmission

Quick guide for procurement procedures

Contents

Getting started

Welcome to **eSubmission**!

eSubmission allows economic operators to respond electronically to EU procurement procedures by preparing submissions (i.e. requests to participate or tenders) and submitting them electronically in a structured and secure way.

At the moment eSubmission supports the following procurement procedures (see here brief explanation of the main types of procurement procedures):

- Open procedures
- Restricted procedures
- Negotiated procedures without prior publication of a contract notice

In addition, eSubmission supports the submission of tenders for award of specific contracts under a framework contract (see the guide here).

As an economic operator, you can:

- Encode your response to a procedure launched by an EU institution or body
- Submit in a secure manner
- View or resume a saved draft
- Delete a draft submission
- Receive proof of submission (Submission Receipt)
- Withdraw a submission before the time limit for receipt of submissions
- Receive proof of withdrawal (Withdrawal Receipt)

Make sure you read the **System Requirements**. You can find them on the front page of the eSubmission application and in the attachments section on the *Parties* and *Tender data* page.

If you want to try **eSubmission** before preparing your submission, use our Dummy call for tenders for Open Procedures.

How do I get technical help?

If you need help, you can contact our support team, from 08:00 until 20:00 CET.

✉ ec-funding-tender-service-desk@ec.europa.eu

☎ +32 (0) 229 71063

Note: the support team only operates in English.

How do I access eSubmission?

You will always access eSubmission in the context of a procurement procedure. You will find published procurement procedures on

- Funding & tender opportunities portal
- TED eTendering application.

If you receive an invitation to electronically submit your response to a procurement procedure, you will access eSubmission through the same platforms.

What do I need to use eSubmission?

To use eSubmission, you need to be registered in the European Commission's user authentication service (EU Login).

To respond to a procurement procedure published on the EU eProcurement platform TED eTendering, you also need an account on TED eTendering.

To identify your organisation in the electronic submission, it must be registered in the Commission's organisations register (Participant Register) and have a PIC (Participant Identification Code). More information on PIC here. Registration is open to all organisations and free of charge.

EU Login

EU Login is the entry gate to sign in to different European Commission services and/or systems. If you do not have an EU Login yet, you can create an account.

For more information, see the EU login help.

TED eTendering

TED eTendering is the eProcurement platform where EU institutions and bodies publish their calls for tenders.

You can create an eTendering account using your EU login.

Funding & tender opportunities portal

The Funding & tender opportunities portal **(Funding & Tenders portal)** is the single entry point (Single Electronic Data Interchange Area) for participants and experts in funding programmes and tenders managed by the European Commission and other EU bodies.

From the Funding & Tenders portal participants can:

- Search opportunities in EU funding programmes or procurement procedures
- Register in the Participant Register (see below)
- Access the Submission Receipts (proof of submission)
- View, edit or delete draft submissions
- Withdraw submissions and access the Withdrawal Receipt (proof of withdrawal)

- View and respond to invitations in My Invitations section
- Manage roles (add/remove persons who will also be able to perform actions on invitations/submissions)

Participant Register

The Commission has set up an online register of organisations participating in EU calls for tenders or proposals in order to apply the "once only" principle: data related to a participant's organisation needs to be submitted only once. Following the registration each organisation obtains a unique Participant Identification Code (PIC). To learn how to obtain a PIC in the Participant Register, please refer to this page.

Step-by-step guide

How to prepare your submission

and submit it

How to prepare your submission and submit it

Start submission based on public invitation (open procedures or 1st step of restricted procedures)

In open procedures or the first step of restricted procedures any economic operator may submit a tender/request to participate by using the TED eTendering link indicated in the contract notice.

Alternatively, you can use the Funding & Tenders portal to find the procedure (use the search function on the top-left of the screen) – clicking on the procedure name redirects you to TED eTendering.

Once in TED eTendering, you need to log in with your Ted eTendering account and then click on *Submit a tender* (open procedures) or *Submit a request for participation* (restricted procedures). This will redirect you to eSubmission.

In eSubmission click on **New submission** to start a new submission or **Resume draft** to resume a draft submission started earlier**.** You can also resume your draft from the Funding & Tenders portal (for more information, see the section on Funding & Tenders portal in this guide).

Start submission upon direct invitation (2nd step of restricted procedures, negotiated procedures without prior publication)

In the second step of restricted procedures and in negotiated procedures without prior publication of a contract notice only the invited candidates may submit a tender.

Restricted procedures

If your request to participate has successfully passed the first step of a restricted procedure, you will receive a notification from TED eTendering inviting you to validate your access to the procurement documents and to submit a tender.

The notification will be sent to:

- the email address of the Contact Person indicated in the submission of the request to participate (first step of the restricted procedure),
- the email address (if different) linked to the EU Login account used to submit the request to participate.

The notifications can be accessed also through the TED eTendering *My messages* section.

To validate your access to the procurement documents you need to click on the link in the notification. The link will direct you to the call for tenders' page in TED eTendering where you will see the *Submit a tender* button.

The *Submit a tender* button will bring you to the Funding & Tenders portal[1] where you need to:

- Log on to the Funding & Tenders portal with the EU Login account of the person indicated as Contact Person in the request to participate

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[1] The submission can be started also directly from the Funding & Tenders portal, without logging on to TED eTendering first.

(first step of the restricted procedure) or, if different, the EU Login account of the person used to submit the request to participate.

Note: The tender can be submitted also from the EU login account of any other user authorised by the above persons through the "Manage roles" functionality of the Funding & Tenders portal, see here.

- Go to *My Invitations* and find the procedure.
- From the *Action* menu of the procedure, click on *Start new submission*.

Negotiated procedures without prior publication of a contract notice

If you have been selected to participate in a negotiated procedure, you will receive a notification from TED eTendering inviting you to validate your access to the procurement documents and to submit a tender.

The notification(s) will be sent to the email address(es) the contracting authority has identified for official communications with your organisation. They can be accessed also through the TED eTendering *My messages* section.

To validate your access to the procurement documents you need to click on the link in the notification. The link will direct you to the call for tenders' page in TED eTendering where you will see the *Submit a tender* button which will bring you to eSubmission.

In eSubmission click on **New submission** to start a new submission or **Resume draft** to resume a draft submission started earlier. You can also resume your draft from the Funding & Tenders portal (for more information, see the section on Funding & Tenders portal in this guide).

If the contracting authority decides to invite you to submit a revised tender through eSubmission, you will receive a notification from the Funding & Tenders Portal.

The notification will be sent to:

- the email address(es) of the Contact Person(s) you have indicated in any of your tenders submitted for this procedure through eSubmission (initial tender as well as any revised tenders)[2],
- the email address (if different) linked to the EU Login account used to submit the initial tender,
- the email addresses linked to the EU Login accounts of other users added by any of the above persons through the "Manage roles" functionality of the Funding & Tenders portal, see here.

The notifications can be accessed also through the area *My notifications* of the Funding & Tenders Portal.

To submit a revised tender through eSubmission in a subsequent round of the negotiated procedure you need to:

- Log on to the Funding & Tenders portal with an EU Login account linked to any of the email addresses specified above.
- Go to *My Invitations* and find the procedure.
- From the *Action* menu of the procedure, click on *Start new submission*.

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[2] Unless the access of a Contact Person has been withdrawn through the "Manage roles" functionality of the Funding & Tenders portal, see here.

Navigating in eSubmission

At any time during the submission process you can consult the procedure main data and documents by clicking on the **Procedure reference number** button on the left side of the screen.

When you start your submission you will see a progress line on top of the screen. This line shows all the steps you have to go through before submitting your tender/request to participate. You can also see which step you are currently in.

Note: *Nothing is submitted to the contracting authority until you have clicked the *Submit* button at the end of the submission process.*

The following sections describe all possible steps (depending on the procedure type and its stage not all steps may appear).

Ways to submit

Applicable to open procedures, 1st step of restricted procedures and 1st round of negotiated procedures

When you start a new submission, you will be asked to indicate:

- how you will submit your tender/request to participate: **Sole submission** or **Group submission,**
- if the submission will involve subcontracting,
- in what language the submission will be made.

After you have made your choice, click on the button *Next* at the bottom of the page.

Parties

Applicable to open procedures, 1st step of restricted procedures and 1st round of negotiated procedures

In this section you must identify the organisations participating in your submission (participants).

Click on *New party* and select the type of participant: main participant (in case of sole submission), group leader or group member (in case of group submission), subcontractor.

All participants, except subcontractors, must be identified with a PIC – Participant Identification Code (for more information, please see the Getting started section of this guide).

To check if an entity already has a PIC (i.e. is already registered in the Participant Register), use the *Search* button.

You can search by PIC, VAT number, National Registration number and country. To be able to search by VAT number or National Registration number you need to also select the country.

If the search produces no results, this means that the entity does not have a PIC yet. See here how to obtain a PIC.

After obtaining the PIC, go back to **eSubmission**, search by the PIC and select the displayed organisation.

The data associated with the PIC in the **Participant Register** will appear on the screen and you will be asked to provide the following mandatory data/documents:

- only for the Main participant or Group leader:
  - Contact Person (name and e-mail address)
  - IBAN/Bank account number
- for all participants: Declaration on Honour (duly completed and signed)

You will not be able to proceed if these data or documents are missing.

Use the *Attachments* section to upload the Declaration on Honour and any other supporting documents.

Upload the documents which the Contracting Authority requires to be provided with the submission (check the call for tenders' documentation).

Use the *Contact Person* section to indicate the contact person for the request to participate/tender.

The user starting the request to participate/tender in eSubmission can indicate as Contact Person himself/herself (the name is already prefilled) or another person. If the latter does not have an EU Login account, a temporary EU Login account will be automatically created based on the Contact Person email address and the person will be invited by email to complete the EU Login registration. The invitation will be an automatic system message with no reference to the procedure.

When submitting a tender in the second step of a restricted procedure or a revised tender in a negotiated procedure, you can select as Contact Person

any of the persons linked to the previous submissions/invitations[3] or indicate a new Contact Person.

The Contact Person receives the role **Primary Coordinator Contact** (**PCoCo)** in the Funding &Tenders Portal and the user submitting the request to participate/tender (if different from the Contact Person) - the role **Coordinator Contact (CoCo)[4]**. See more about these roles here.

Click *Done* when you are ready.

Note: once you have passed the "Ways to submit" step, it is no longer possible to change the structure from Group submission to Sole submission or vice versa. In case you want to modify the structure of your submission or change the Group leader, you need to create a new submission overwriting your draft submission (all previously entered data and uploaded documents will be deleted).

Click *Next* to move to the next step.

Lots

Applicable to open procedures and 1ˢᵗ step of restricted procedures

In a procedure with several lots, choose the lot(s) for which you would like to submit a tender or request to participate and then click on the button *Next.*

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[3] The system will propose for selection the following persons (unless their access has been withdrawn via the "Manage roles" functionality of the Funding & Tenders portal): all Contact Persons indicated in the previous submissions, the person who has made the first submission (if different from the first Contact Person), as well as any other persons added through the "Manage roles".

[4] Other persons added through the "Manage roles" functionality of the Funding & Tenders portal also receive the role Coordinator Contact.

Note: The identification of participants applies to the submission as a whole. Therefore, if the composition of the consortium is different per lot, you will need to make a separate submission per lot.

Tender data

Applicable to open procedures, 2nd step of restricted procedures and negotiated procedures (any round)

In this section you need to enter the amount of your tender (using the same format as in the example on the screen), upload the financial offer and, if required by the contracting authority, the technical offer.

Once you consider the tender data correct and the submission complete, click on *Next*. The button will be active only if all mandatory data and documents have been provided.

> **At this stage, your draft submission, including all your documents, *is not submitted yet*.**

*Note: during the submission process you can always check which documents you have uploaded by clicking on the **Submission documents** button on the left of the screen.*

Submission ID: 300008369
Last saved: 29/11/2019 12:02:58 UTC+01:00

≡ Submission documents   2

Submission report

Applicable to all procedure types and stages

The submission report is generated by the system and is part of the submission. The report lists all the documents included in the submission.
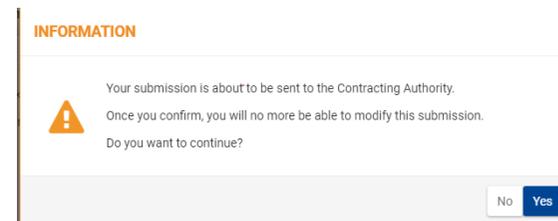
eSubmission **automatically generates** and **adds the submission report to your submission**. You can consult the report on the screen or download it for your own records. You don't need to sign and upload the signed report in eSubmission.

After viewing the submission report, click on *Next* to continue.

Submit to the Contracting Authority

Applicable to all procedure types and stages

When you are ready to submit your tender/request to participate, click on *Submit*. The system will display a confirmation message.

INFORMATION

⚠ Your submission is about to be sent to the Contracting Authority.
Once you confirm, you will no more be able to modify this submission.
Do you want to continue?

No   Yes

Click *Yes* if you want to confirm: **you will no longer be able to modify this submission.**

An e-mail notification will be sent to the e-mail address linked to the EU login account used to make the submission. This e-mail notification contains a link to the **Funding & Tenders portal** where you can find the Submission Receipt.

For more information see the section on **Funding & Tenders portal** in this guide.

The Submission Receipt constitutes proof of compliance with the time limit for receipt of submissions.

Manage submissions in Funding & Tenders portal

View submissions and invitations

To view your submissions or invitations use the *Login* button of the Funding & Tenders portal at the top right end of the home page and enter your EU Login and password.
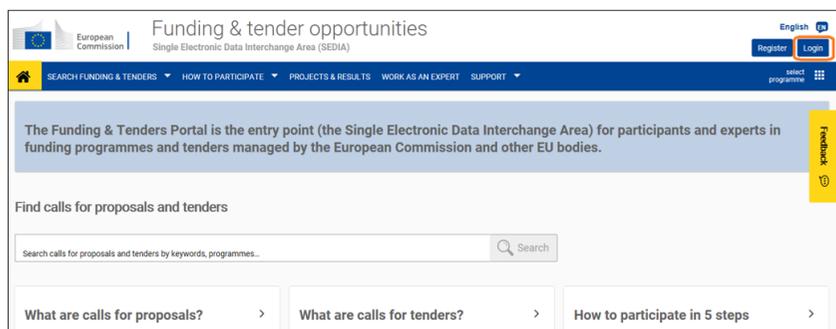
Under the section *Manage My Area* on the left you will find:

- *My Submission(s)*: your submissions for open procedures, 1st step of restricted procedures and 1st round of negotiated procedures.

- *My Invitation(s)*: your invitations for 2nd step of restricted procedures and subsequent rounds of negotiated procedures, as well as your submission(s) in response to these invitations.

A search field is available on the right above the list of submissions/invitations

My Submission(s) section

For each submission you see the procedure reference number, the submission ID, the timestamp of the last action performed and the submission status (draft, submitted, withdrawn, deleted), the lot (if applicable), the procedure title, the procedure type and the step/negotiation round (if applicable).

Except for deleted submissions you have the *Action* menu on the right of each submission. This button allows you to perform different actions depending on the status.

For submissions in **Draft** status:

- View Submission:
  - o Select *View:* **eSubmission** opens the screen you were in when you left the application. It is not possible to edit the submission as you are viewing it in read-only mode.
- Edit Submission
  - o Select *Edit*: **eSubmission** opens the screen you were in when you left. You can now edit your submission in eSubmission.
- Delete Submission
  - o Select *Delete*: the draft submission will be deleted from the **Funding & Tenders portal.**

For submissions in **Submitted** status:

- Withdraw Submission (available only before the deadline for submission)
  - o Select *Withdraw*: provide the reason to withdraw the submission and confirm by clicking on the *Withdraw* button. Once you have withdrawn a submission, you cannot view, edit or submit it again.
- View Receipt:
  - o Select *View Receipt*: the Submission Receipt is displayed.
- Manage Roles:
  - o Select *Manage Roles*: you will be able to view and manage the access to your submissions in the Funding & Tenders portal, i.e. add/remove persons who will also be able to perform the herein described actions on your submissions. This option is available only <u>after the relevant opening session</u>.

For submissions in **Withdrawn** status:

- View Withdrawal Receipt
  - o Select *View Withdrawal Receipt*: the withdrawal receipt is now displayed.

My Invitation(s) section

For each invitation you see the procedure reference number, the lot (if applicable), the submission ID, the submission deadline, the timestamp of the last action performed and the invitation status (received, closed), the procedure title, the procedure type and the step/negotiation round.

The *Action* menu allows you to perform the following actions per status.

For invitations in **Received** status:
- Start New Submission
  - o Select *Start New Submission* to submit a tender.
- Manage Roles
  - o Select *Manage Roles*: you will be able to view and manage the access to your invitations (add/remove persons who will also be able to perform the herein described actions on your invitations).

To view and manage the submissions against an invitation, open the *Show submission* menu.

The *Action* menu allows you to perform the following actions.

For submissions in **Draft** status:

- View Submission:
- Edit Submission
- Delete Submission

For submissions in **Submitted** status:

- Withdraw Submission (only if the deadline for submission has not passed)
- View Receipt
- You cannot manage role at the level of the submissions linked with an invitation.

For submissions in **Withdrawn** status:

- View Withdrawal Receipt

Manage roles in Funding & Tenders portal

The Contact Person indicated in eSubmission receives the role **Primary Coordinator Contact** (**PCoCo**) in the Funding &Tenders Portal. There can be only one Primary Coordinator Contact per invitation or submission.

The user submitting the request to participate/tender (if different from the Contact Person) receives the role **Coordinator Contact (CoCo)**.

The roles of **Primary Coordinator Contact** and **Coordinator Contact** allow the user to perform the following actions in the Funding &Tenders Portal after the request to participate/tender is submitted:

- Withdraw submission (available only before the submission deadline);
- View Receipt (or Withdrawal receipt if the tender is withdrawn);
- Submit a tender in the second step of a restricted procedure or a revised tender in a negotiated procedure;
- **Manage roles** (available only after the opening session) - add/remove persons as **Coordinator Contacts** as follows:
    - Log on to the Funding & Tenders portal.
    - Go to *My Submissions* if you have not received yet an invitation for the second step of the restricted procedure or the subsequent rounds of the negotiated procedure or to *My Invitations* if you have already received the invitation.
    - Find the procedure (you can use the search field on top).
    - From the *Action* menu, click on *Manage roles.*
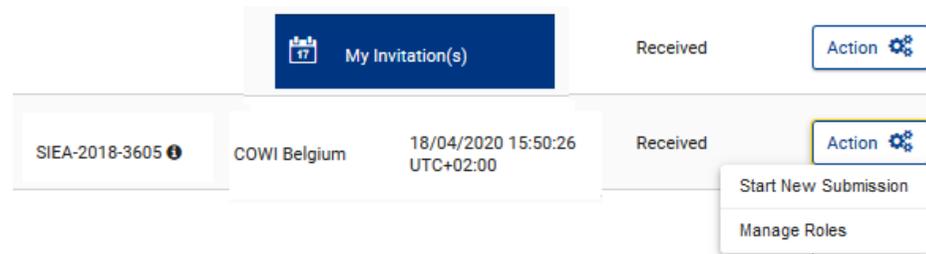
- Click on *Edit roles,* then on *Add roles* and fill in the required details.

You can only add/remove persons with the role Coordinator Contact. The Primary Coordinator Contact cannot be changed through the *Manage roles* functionality. Contact the contracting authority if you need to withdraw access for the Primary Coordinator Contact and appoint a new one.

For more information about these and other Funding&Tenders portal roles, please consult the relevant page on F&T Portal Wiki.

Manage notifications in Funding & Tenders portal

My notifications

You can access this page by clicking on the bell icon at the top right of the screen after having logged in to the Funding & Tenders portal.

On this page you can find the following formal notifications:

- Submission Receipt (proof of submission of a tender/request to participate)
- Withdrawal Receipt (proof of withdrawal of a tender/request to participate)
- Reception of invitation (invitation to submit a tender in subsequent rounds of a negotiated procedure).

In the *Preferences* tab under *Manage all notifications* (at the bottom of the notifications list) you can choose the frequency of Funding & Tenders portal email notifications. Independently of your choice all your notifications are always available in the section *My notifications*.

My Formal Notification(s)

This section, available under *Manage My Area* on the left, will remain empty as it is currently not used for procurement procedures.